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## ROUTING AND RECORD SHEET

SUBJECT: (Optional)

Initiatives &amp; Objectives for discussion at OL Planning Conf, 7-8 Oct 86

FROM:

Planning Officer, IMSS

EXTENSION

NO

DATE

3 Oct 86

TO: (Officer designation, room number, and building)

DATE

RECEIVED

FORWARDED

OFFICER'S INITIALS

COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)

1.

C/NBPO  
1J45 HQ

2.

C/B&amp;FB

3.

C/PMS

4.

5.

C/SS

6.

C/FMD  
3E14 HQ

7.

C/PD

8.

C/P&PD  
154 P&P Bldg

9.

C/RECD

10.

C/SD

11.

12.

13.

14.

15.

A-IUO when separated  
from classified attachments

Attached for your info are copies of the consolidated (1) proposed FY-87 objectives and (2) additional FY-89 initiatives and new FY-90 initiatives. All are scheduled to be discussed at the conference Tues.

Please feel free to take your copy with you if you'd like, but I plan to have enough there to hand out to everyone attending.

Thanks to you all! You did a super job of responding on time, in a consistent format, and with some excellent ideas.

 Edie
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Proposed FY-87 objectivesFMD

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1. Develop move schedules; discuss/resolve key issue impacting HQ Complex Consolidation (ILSP).
2. Backfill existing HQ Bldg/upgrade utilities. Develop plan/schedule for up to two-thirds rehab of existing HQ Bldg.
3. Implement waste-disposal plan. [redacted] report provides options for disposal but indicates that incineration is the most effective and economical.
4. Expedite design capability. Create procedures/capabilities for rapid survey/design of space requirements to support the establishment of DO Task Force offices.
5. Upgrade postal examination. Research/acquire improved equipment to analyze suspect packages. Becoming more critical with steady growth of parcel-post material entering the compound (up 97% over 1985).
6. Purchase/install new x-ray machine for M&CB. New machine has zoom lens for more precise examination of incoming material and will enhance our capacity to screen large bulky items.
7. Implement the M&CB international courier service.
8. Reestablish the North Dock facility at HQ.
9. Upgrade Motor Pool. Install new, larger car-wash capability. Construct new services pit for maintenance on large vehicles. Install holding tank in the MP area to drain buses of effluent.
10. Develop O&M program for OHB. Thoroughly review all previous documentation/procedures/long- and short-range objectives. Ultimate goals: establish a computerized maintenance-management program; develop computer-based, graphically enhanced O&M procedures; monitor selected major utility systems serving HQ Bldg; and conduct a study on Energy Management System for the entire HQ Bldg including Power Plant and New Bldg.
11. Establish program for FMD/Opns oversight of after-hours operations. Identify project officer from Maintenance Br to work 3-11 shift. Establish liaison w/Escort Sec of HQ Security. Establish checklist and reporting format for renovation projects.
12. Develop a more responsive PTI system for HQ and external buildings.

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Proposed FY-87 objectives (cont'd)

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13. Develop/implement building standard for overhead lighting and ceiling configuration. Prepare scope of work for A&E. Award contract for A&E design. Develop floor-by-floor plan for establishing database.
14. Establish EDR Co-op Program w/Culinary Institute of America.
15. Develop workable HQ Bldg clean-up program to keep material out of hallways.
16. Design/complete Jogging Tunnel.
17. Provide coffee service for conference rooms in NHB. Identify serving areas and develop procedures to provide efficient services.
18. Publish a handbook describing all M&CB services.

PD

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1. Issue an Agency supplement to the FAR. While not specifically mentioned in the D/L's action plan, this objective will help us do our jobs better by having a document which sets forth in a concise and coherent fashion the Agency's basic policies and procedures to be followed in the acquisition process. This initiative was started in FY-1986, but needs to be highlighted as our number one objective for FY-1987 to ensure its completion.
2. Issue a new FOCI policy. This objective was mentioned in the D/L's action plan and should be considered our number 2 objective for FY-1987. The current policy is a bureaucratic fiasco of the first order and cannot be implemented with the resources available to do the job. In fact, it is now consuming far more resources than the threat from FOCI really warrants when compared to a number of other industrial security problems.
3. Implement the Coopers and Lybrand Report. This is a given since the final report has now been received.
4. Develop ways to cope with shortage of clerical personnel. This objective should be geared principally to PD/GPB, which has a near-term problem. Alternatives such as planned Saturday work, contracting out, and hardware/software options must be considered.
5. Develop a Procurement "Flying Squad." This objective would provide opportunities for procurement personnel to experience the overseas work environment while providing much needed support to operational requirements.

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Proposed FY-87 objectives (cont'd)

6. Establish a program to enhance competition in contracting. Since enactment of the Competition in Contracting Act, the requirement for competition has never been more intense. We need an objective to take steps to improve our record with regard to increasing competition on Agency contracts.

\* Re the Group-A (critical) operational activities mentioned in the D/L's action plan for 86/88, a memo was distributed on 2 Sep 86 to all PD personnel identifying these activities as requiring special attention during the next several years.

P&PD

- C 1. Conduct baseline survey of printing & photography. Purpose is to (a) determine equipment capacity in terms of present and future requirements and (b) analyze utilization of personnel in terms of production capacity.
- C 2. Conduct survey of major printing/photography equipment (systematic, branch-by-branch study or complete division-level study.) Purpose is to stay abreast of technology and meet P&PD needs.
- C 3. Establish P&PD historic data for equipment, supplies, and production. Collect data for future justification and evaluation purposes.
- C 4. Establish Printing & Photography Advisory Group (PPAG). Involves supervisory personnel in decision-making.
- SC 5. Provide electronic interfacing for computer graphics. FY-86 MBO.
- C 6. Improve P&PD front-office environment. FY-86 MBO.
- A 7. Continue graphic interface for FOC of Digital Prepress System. FY-86 MBO.

RECD

- 25X1 B c 1. Create  Project Office. Manage the development of project requirements, w/particular attention to time, staffing, and budgetary realities. RECD proposes to -- *o/p*
- 25X1 a. Create and staff  positions.
- b. Select an A&E firm for requirements development.

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Proposed FY-87 objectives (cont'd)

- c. Manage the rigid interrelationships of schedule/cost/quality.
- d. Give constant feedback on project status to OL management, effected components, and/or general Agency population.
- e. Obtain the services of private consultants and manage their use.

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- g. Manage migration from existing to new space, including the use or disposal of the buildings presently occupied.

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3. Establish standards and procedures to control repairs/alterations in external buildings. In the interest of maintaining the existing procedures for controlling FY-87 funds, it is recommended that the moratorium on alterations and other nonessential work requests be continued through FY 87. Vaulting requests for the purpose of convenience is an example of nonessential work and should not be

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Proposed FY-87 objectives (cont'd)

considered for short-term occupancy. Standards will be established in keeping with the above and to maintain consistency throughout the Agency.

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5. Support decentralized requirements. Review existing engineering support requirements, and determine additional requirements. Known additional requirements are for OC, FBO and the DS&T. Evaluate the scope of these requirements and how best to satisfy them. Include requirements such as a project engineer assigned to oversee the  work and an RECD facilities-maintenance specialist assigned  to manage  responsibilities

- Historically RECD has been unable to hire sufficient people to meet vacancies within the present system. Perform study of in-process time of applicants, history of high number of vacancies, number of people in the pipeline, disqualification rate, etc.
- Study RECD vacancies (approx 22), and determine other possible needs. Extraordinary assistance from the DDA in the form of accelerated recruitment will be required to meet RECD's mission.
- Draft memo to DDA to identify vacancies/needs. Include applicant processing statistics and other data to prove that we cannot meet our engineering mission under the present processing arrangements.
- Develop a specific strategy to support the requirements of external components, some of which are:

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- Develop a training program for new employees to hasten their knowledge and thereby effectiveness in project management through cross-training and expansion of RECD's training program. This will require additional RECD funding for training.
- Increase travel/budget to meet increased needs.

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Proposed FY-87 objectives (cont'd)SDA 1. Improve the exchange of logistics intelligence between Supply Div  
(Essential) and component logs officers.

- ° Increased demands for supply support are reducing excess capability in the supply system and will ultimately affect our ability to react to ad hoc requirements. New programs with long lead-time procurement, new facility requirements, and heavy workload implications will exacerbate the situation. It is imperative that SD and component logs officers do a better job of anticipating and jointly planning for substantial requirements, capabilities, capacities, and problem areas.
- ° SD plans to improve communications by increased visitations, conducting periodic updates to decentralized logs offices, and hosting a senior logs-officer conference, and will seek other means to increase the amount and value of logistics intelligence flowing (two-way) between the Div and components. We will also assess and improve SD's functional capability to generate intelligence and support components.

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Proposed FY-87 Objectives (cont'd)

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5. Enhance the management/development of SD human resources.  
(Essential)

- With more than [ ] professional supply careerists, increased positions authorized in HQ and field components, frequent TDY requirements, and heavy recruitment activity, more efficient and effective management techniques are needed to track requirements, rotational assignments, and training.
- With the large number of new personnel and rapid reassignment of MLS employees, we must improve the professional development process by identifying training/assignments tailored to individuals' needs and ensuring that those needs are met.
- SD management must develop and rely on better administrative and decision support systems to identify/solve/follow up on assignments and personnel-development requirements.

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6. Streamline disposal procedures in the HQ area.  
(Important)

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- Material awaiting classification/disposal [ ] occupies valuable floor space for often lengthy periods. Turn-in of property associated with PTPE and the moves to [ ] will sharply increase space/handling requirements.

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- Efforts will be directed toward reducing the time required for the disposal of property, but will also explore procedures that [ ] direct turn-in to GSA, DoD, etc.

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Proposed FY-87 objectives (cont'd)

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(Important) 7. Enhance the ASAPS data base to make it more responsive to customer needs. A product survey conducted by DCB will collect suggestions re ways to improve procedures and the data base. These suggestions will be reviewed with OIT and new system enhancements developed/tested for customer acceptance. Revised user manuals will be issued and customer training conducted.

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25X13IB (Important) 8. Expand the application of bar-code technology

[redacted] will continue efforts to reduce labor requirements, reduce data-entry errors, and provide improved management information through the use of bar-code techniques. Bar-code capability existing at [redacted] will be expanded to support receiving functions, bin tag/location management/inventory functions, and direct reading/entry of [redacted] Issue Notice [redacted] information.

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(Important) 9. Reduce administrative burden in logistics operations through regulatory changes.

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Proposed FY-87 objectives (cont'd)

NBPO

Determine role of NBPO in FY 87/88. Portion of FY-86 MBO. Will require coordination w/FMD and guidance from the D/L (MBO not needed if already addressed by OL senior management).

- ° Alternatives include: (1) Dissolving NBPO and returning personnel to their respective career components in early FY 88 when moves into the NHB begin. (2) Absorbing all/some of NBPO's current personnel/functions into FMD as a separate staff to oversee NHB responsibilities. (3) Absorbing NBPO into FMD to assist existing workload and NHB phase-in requirements.
- ° With another full year of construction, any radical change in mission/organizational structure must be carefully weighed. NBPO's impacts are greatest at 2 points in the project: (1) early planning ( [ ] tenure). (2) Last 6-12 mo. of construction, when it is essential that completion dates be refined and met in order to minimize surprises where there is no time to recover.

B&FB

1. Develop uniform standards for OL elements to use in monthly/quarterly budget-review process. FY-86 MBO. These standards will facilitate development of formatted reports, which, in turn, will allow for a clearer presentation of budget data to OL management.
2. Enhance coordination between Finance Officers assigned to OL elements. FY-86 MBO. Finance careerists are currently assigned to OL/B&FB, SD/CD/B&F and SD/CLB, and FMD/B&F. Greater coordination about financial and logistical considerations and, if possible, cross-fertilization and training will improve the value of these employees to both OL and OF.

IMSS

- B(e) 1. Plan for move of OL ADP equipment to NHB. Evaluate/identify/clarify/plan for ADP issues relating to OL's move to the NHB in Sep 88.
- ° As of Sep 86, about [ ] OL personnel will move to the NHB and bring with them approx. [ ] pieces of data/word processing equipment (Delta Datas, Wang apparatus, etc.).

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Proposed FY-87 objectives (cont'd)

- ° At present no known planning has been done for the FY-89 installation/use/requirements for Delta Data terminals, dumb 3270 terminals, smart 3270 terminals, graphics devices, Wang equipment, printers, the cost of relocating these devices from their present stations, and the acquisition of special ADP-configured workstations (furniture).
- ° The concern for this problem extends to space requirements for housing and operating this equipment in NHB, plus the current lack of budgetary details that would clearly identify the funding needed to achieve the relocation. Preliminary investigation and advice (from OC) indicates that now is the time to initiate this planning. The attached outline of the problems has already been forwarded to the ILSP manager.

B(e) 2. Oversee scheduled reduction of OL paper file holdings in preparation for moves to the NHB (joint w/stfs and divs).

C(b) 3. Place an operational LOCS in selected field sites.

- ° Focus attention on evaluating commercially available software that can provide accountable-property and inventory-control capabilities to support OL requirements.
- ° Install PCs in one or more  sites, with one or both capabilities.

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C(b) 4. Create a computer-based automated electronic  sites. FY-86 MBO determined that this is feasible. The technique will permit CRAFT users to generate requests for materiel. The requests will be electronically manipulated through the station's communications gear to HQ via cable traffic. At HQ it will pass through more electronic software to reach the area division and/or SD/SMB for action, in either electronic form (on Delta Data) or in hard copy. Requires development of interfacing software.

C(b) 5. Create formal ADP training program for all OL employees (will require filling vacant training position in DAS).

- ° Acquire qualified instructor and curriculum.
- ° Provide hands-on training for specific OL data/word processing applications.
- ° Emphasize computer literacy when recruiting new employees.

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Proposed FY-87 objectives (cont'd)

- Establish ADP training curriculum for new EODs, OL staff employees, and OL senior management.
  - Include basic instruction on Wang word processing, AIM and other electronic information capabilities.
  - Promote personal use of terminals to acquire/generate info.
  - Establish PC (Wang & IBM) support group (to assist OL users with commonly used hardware and commercial software).
  - Provide user-friendly "how to" texts that encourage ADP use, teach OL systems to OL users; publicize capabilities/advantages of OL's ADP facilities.
- C(c) 6. Have CLAS Beta (test) site facility operational (IOC) by 30 Sep 87 (FOC by Oct 88). This involves using, at a minimum, the Manufacturing (inventory control, requisitioning) and Purchasing software packages. The Beta site will use live data and will run parallel with existing systems until full implementation takes place.
- C(h) 7. Oversee an OL-wide review of the approximately 190 OL forms and their subsequent revision/consolidation/cancellation (joint w/stfs and divs).
- C(h) 8. Track the implementation of information-handling recommendations made by the OIS audit team in FY 86/87 (joint w/stfs and divs).
- C(h) 9. Complete review/revision of all pre-1984 OL regulatory issuances (joint w/stfs and divs). An IMSS FY-86 objective to update a total of 83 LIs and LNs was too ambitious to be completed by the end of FY 86 because of the large number involved and because the updating of several of these issuances should await key events such as organizational changes resulting from the Coopers & Lybrand study. About 50 percent of the total have been updated. The remainders are more difficult and are scheduled for completion by end FY-87.
- C(h) 10. Define, and disseminate information about, channels required for acquisitions/disposal of special-approval items (joint w/SD, PD, & PMS). About 20 categories of property (specific items such as reproduction equipment, e.g.) require special approval prior to acquisition, replacement, transfer, or disposal. For each category, a routing sequence for approval will be defined with detailed processing instructions in regs, handbooks, and/or Yellow Pages.

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Proposed FY-87 objectives (cont'd)

C(h) 11. Publicize (in coordination w/OF, OP, OS, etc.) limitations/benefits of the Claims Act to eliminate recurring problems. These problems include the matters of cash advances, storage of POVs, and thefts of cash/jewelry/other personal property from offices. For example, cash advances for travel, training, living allowances, etc., become accountable property and the loss thereof is considered the employee's personal loss. Maximum reimbursement in such losses is \$300, barring negligence. For employee/Gov't protection, amounts over \$300 should be carried in travelers' checks (available on request through Agency Disbursing Offices).

25X1 C(h) 12. Create universal Wang glossary for OL users (format documents to conform w/Agency Correspondence Handbook [ ] and unique OL procedures). Some offices adhere strictly to the HHB; others do not. To help all OL stfs/divs (new clericals in particular) create documents in a uniform manner, a glossary could be written to ensure proper placement of text lines, correct top and bottom margins, and conformance with other format requirements.

C(h) 13. Oversee development of detailed operating procedures for all appropriate jobs in OL divs/stfs (joint w/stfs and divs). A "how-to" guide (w/samples of properly executed forms), based on the actual work done by the position incumbent, to help employees filling in temporarily or replacing someone who has been transferred. For best results, requires a focal-point organizer/writer/coordinator in each stf/div. *N/O*

P&TS

1. Maintain ongoing recruitment efforts to ensure "at ceiling" strength on 30 Sep 87.
2. Conduct Phase II of OL training review. Follow-up/monitor courses reviewed in FY-86 MBO. Identify core courses/training required for advancement to next higher grade levels.
3. Update Employee Handbook. FY-86 MBO (carried over, per DD/L).
4. Update/reorganize all OL/TO records.

PMS\*

- 25X1 1. Publish Agency FAR Implementation Guide. FY-86 MBO. For review by senior Agency procurement officials, L&PLD/OGC, and SS/OL, to determine acceptability and content. Submit as a stand-alone handbook or an addendum to [ ]

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Proposed FY-87 objectives (cont'd)

2. Promulgate one uniform workable policy re FOCI. Review present applicable documentation/procedures. Will minimize frustration and be functional/responsive to Agency requirements.
3. Implement the remaining (approx 10) Coopers and Lybrand recommendations approved by the D/L. These actions reflect operational changes over the coming year beyond whatever other organizational changes may be approved.
4. Publish informal, bimonthly Procurement Newsletter. Cover happenings in the world of procurement, e.g., upcoming policy/procedural changes, significant upcoming legislation, personnel movements, D/L comments, etc.
5. Implement review of Contracting Teams. Establish baseline format for reviewing contract teams. Establish a program to review and assess at least 3 or 4 teams in FY 87.
6. Continue application of the Contracting Officer Intern Program (COIP) to appropriate procurement personnel currently in the system and to new individuals coming on board.

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SS

1. Strengthen the Industrial Security Program by requiring contractors to respond in writing, within 90 days, re actions to correct deficiencies cited by SS/OL officers.
- A(e) 2. Continue to include in the SS/OL orientation briefing counter-measures to thwart terrorist activities.
- B(a) 3. Provide security-clearance support to and inspections of facilities for the PTPE program.
- B(c,d,e) 4. Process security-clearance requests for individuals to be utilized on the New Building Project, other Agency facilities and the ILSP.

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Proposed FY-87 objectives (cont'd)

- 25X1 C(e) 6. Refine the FOCI Program to better fit Agency procurement procedures and to protect Agency equities (joint with PMS)

- C(j) 7.

- C(j) 8. Distribute the new Industrial Security Manual to contractor security officers.

- 25X1 C(j) 9.

- C(j) 10. Arrange for OS's Security Education Group to present a series of security-awareness briefings to OL personnel.

- C(j) 11. Input all Industrial Security Reinspection Reports into the Wang system (approximately 90% complete).

- C(j) 12. Mail to contractor security officers the new personal-declaration attachments to the Personal History Statements.

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